

**Job Title:** Investment Reporting Analyst

**Line manager:** Head of Development Strategy and Reporting

**Grade:** 4

**Direct reports:** N/A



**Role purpose:** To develop and manage a suite of reports and management tools including exception reporting to ensure the investment programmes (development, planned works and remediation) are run based on robust and accurate data.

## Key results:

- Develop and manage a suite of reporting tools which allow Development/Project Managers, Heads of and Directors to review relevant information for their projects and programmes.
- Develop exception reports to ensure data is robust and clean for the purposes of reporting.
- In partnership with the Programme and Procedure team ensure that monthly KPIs and reported accurately and with an auditable process.
- Provide accurate sales reporting to the central and regional teams including delivery against budget, stock analysis and sales rates.
- Provide robust and innovative reporting against regional development and sales targets, where possible using technology and automation, including future forecasts by ensuring that the disciplines for programme forecasting are ambitious, but realistic.
- Provide departmental programme reporting using core single source data, by region, including weekly development and sales reporting, grant utilisation and other ad hoc regional projections to track performance, making recommendations to improve profitability.
- Ensure process, system and data management is effective and consistent across the department and all regions.
- Develop analytical tools for internal data which allow for the development of future strategy on the basis of prior performance and trend analysis.
- Work with Finance Teams to ensure standardised power BI reporting on the basis of robust data.
- Work with other corporate teams to provide expert analytical skills to solve data problems across systems.
- Work with Sales, Asset Investment, Development, Data Quality and Finance teams to ensure accurate data across systems.

## Success metrics:

- Enable expert data management through different Peabody systems to ensure key compliance information is transitioned from development to customer service and asset management systems.
- Measurable improvements in data quality.
- Creation of tools to enable efficient project and programme management.
- Reporting accurately and within the agreed timescales.
- Positive feedback from internal stakeholders.

**Version Date:**

**Signed off by:**

## About you:

### You will be:

- Able to work independently, exercising initiative and good judgement.
- A strong team player, supporting colleagues and managers to ensure consistently excellent services.
- Able to work under pressure and meet deadlines and targets and effectively manage your time to balance multiple priorities.
- Proficient in Microsoft Office applications and IT tools, including Power BI.
- An excellent communicator with outstanding interpersonal skills.

### You will have:

- Demonstrable track record in delivering innovative reporting using Excel and other reporting tools, such as PowerBI.
- A minimum of three years of proven experience in developing Power BI reports, including proficiency in writing DAX formulas.
- Strong knowledge of the policy, funding and delivery/planning frameworks applicable to housing development and regeneration by a regulated housing association.
- Strong financial acumen and excellent analytical skills.
- A track record of successful budgetary management and proven ability to interpret complex financial information to deliver results.